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For the

1976 "Request For Proposal" (RFP) Contest

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BY

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(A system for predicting the economic impacts of
new development in the County of San Diego.)

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A. Friedman

A SYSTEM FOR PREDICTING THE
ECONOMIC IMPACTS OF NEW DEVELOPMENT IN
THE COUNTY OF SAN DIEGO

Office of Environmental Management
Environmental Development Agency
County of San Diego
Room 252, County Administration Center
1600 Pacific Highway
San Diego, California 92101

March 10, 1975

A STUDY OF THE EFFECTS OF THE
RECENT DROPS IN THE PRICE OF
THE CURRENCY ON THE ECONOMY

REPORT OF THE COMMISSIONER OF THE
BUREAU OF THE CURRENCY
AND
THE
UNITED STATES DEPARTMENT OF THE TREASURY
WASHINGTON, D. C.
1933

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BACKGROUND

The County's Office of Environmental Management (OEM) with the assistance of a consultant, Copley International Corporation (CIC), has recently completed an initial feasibility study for the design and formulation of an economic impact model. The purpose of the model, when constructed, will be to evaluate the private sector economic impacts which accrue to the local economy as a result of new large-scale development proposals.

The Phase I feasibility study entitled An Examination of Issues and Evaluations of Techniques for Predicting Economic Impacts of Development in San Diego County is now complete and the final report is now available for distribution upon request. The report identifies both the most significant economic issues facing the County relating to development and the most efficient and cost-effective techniques for evaluating those issues.

The issues of major significance identified by the consultant fall into the three broad categories of employment, income and production. Special emphasis was placed on the relationship between these issues and population migration, income distribution and the economic diversity and stability of the local economy. The two major techniques/systems suggested for best evaluating these issues are either (1) a sophisticated econometric model, accompanied by a supplementary econometric analysis of important industries; or (2) a combination input-output system with a smaller, more simplified econometric model. With both systems, the consultant recommended a package of smaller studies which would either serve as data inputs or provide supplementary information otherwise not obtainable from the larger model.

Based upon the findings and recommendations of the consultant, OEM is now prepared to let contract(s) in amounts up to \$100,000 to implement selected techniques. The implementation of selected techniques will include, but not necessarily be limited to, the design, development, and assistance in implementation of the specific impact evaluation model/system outlined in this RFP.

The final economic impact evaluation model/system will be used by County staff on an on-going production basis to identify and evaluate both long run and short run impacts which may occur in the local (County) economy as a result of a new, large-scale development proposal. For definitional purposes in this RFP, development proposals consist of commercial and industrial proposals, large-scale residential developments, general and community plans, and major environmental actions.

The Japanese Ministry of International Trade and Commerce (MITI) has been instrumental in the development of a comprehensive long-range industrial plan, the Tenth Five-Year Plan, which is being formulated by the Ministry of Finance and the Ministry of Economic Affairs. The purpose of this plan is to guide the Japanese economy through the 1970s and 1980s, and to ensure that the Japanese economy remains competitive in the world market.

The Tenth Five-Year Plan is being formulated by the Ministry of Finance and the Ministry of Economic Affairs. The plan is being formulated in a very comprehensive manner, and it is expected that it will be completed by the end of 1970. The plan will cover a wide range of economic activities, and it will provide a detailed outline of the Japanese economy's development over the next two decades.

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Upon completion, the economic impact model/system will be combined with the County's existing Basic Fiscal Impact Model (BFIM) and Environmental Impact Report (EIR) process to provide decision makers with well-balanced and comprehensive information on new development proposals. The economic impact model/system will constitute the third and final component of a comprehensive new development evaluation system.

OBJECTIVES

The major objective of OEM is to accurately assess both the short and long run economic impacts of new development in San Diego County. During the Phase I feasibility study, a number of key issues and their related components were examined and evaluated regarding their significance, data availability, and capability of being measured. Agreement was reached between the consultant and OEM regarding those issues which are of critical importance to the decision-making process and thereby to the economic impact analysis system.

Based on the above criteria, a minimum of the following general and specific economic issues should be addressed by the economic impact analysis system. Specific attention should be paid to differentiation between short and long run impacts of each.

General Issues

1. Employment
2. Income
3. Minority Employment and Income
4. Population Migration
5. The Aggregate Regional Economy
6. The Impact of a Specific Proposal Over Time

Specific Issues

1. Migration - To what extent does new development encourage new in-migration of persons into San Diego County? What is the demographic composition of new residents? How much new in-migration is employment induced and/or non-employment related? What is the relationship between new in-migration, unemployment and labor force participation rates of the various sub-groups involved?
2. Income - What is the impact on total, per capita and minority group income of new development?
3. Employment - How many new jobs are created by major economic sector, industry, skill and minority group? What is the impact on unemployment, the unemployment rate and unemployed local residents of either adoption or non-adoption of a specific proposal?

4. Diversity/Stability of Economic Base - How would a specific proposal enhance the region's economic base and/or make it less susceptible to national or cyclical swings while decreasing its dependency on any new one major sector?
5. Output - How would a specific proposal affect San Diego's gross regional product? What are the appropriate income, output, and employment multipliers which can be used to measure the various linkages in the local economy?

Based on the key issues discussed in the consultant's Phase I report and OEM's desire to provide the most accurate, consistent, and easily-updatable system to evaluate those issues, the County has decided to combine the best aspects of both recommended systems (input-output and econometric) into a totally-integrated and comprehensive economic impact evaluation system. Prospective consultants are therefore asked to address their proposals to a hybrid system which will be composed of the following four major techniques and methodologies to be described in greater detail in the following section:

1. An Input-Output Model
2. A Disaggregated Econometric Model
3. Supplementary Econometric Labor Market Analysis
4. An Approximation Techniques Package

These components will comprise the framework of a sophisticated economic impact analysis system for San Diego County. They will be required to utilize a common data base, and be linked to each other theoretically as well as mathematically. For instance, aggregated parameter estimates from the econometric model may "drive" the input-output matrix. The components and their products will also be required to be subjected to validity testing based on historical data. Thus, a methodology for performing comparative evaluations of disaggregated output from both econometric and the input-output model will also be necessary. This methodology will determine the most accurate way of determining any one specific parameter estimate.

The four above-mentioned major components will be supported by a group of additional research projects which will either provide input data to, or analyze the results of, the major system components. This group includes the following four (4) items (#5-8) which will be described in greater detail in the following section:

5. Developer Questionnaire
6. Guidelines of Need for Economic Analysis
7. Evaluation of Autonomous vs. Induced Effects
8. User Guide and Format for Systems Analysis

1. The first objective of the study is to determine the effect of the independent variable on the dependent variable. This is done by comparing the results of the experimental group with the control group.

2. The second objective is to determine the effect of the independent variable on the dependent variable. This is done by comparing the results of the experimental group with the control group.

3. The third objective is to determine the effect of the independent variable on the dependent variable. This is done by comparing the results of the experimental group with the control group.

- 1. The first objective of the study is to determine the effect of the independent variable on the dependent variable.
- 2. The second objective is to determine the effect of the independent variable on the dependent variable.
- 3. The third objective is to determine the effect of the independent variable on the dependent variable.
- 4. The fourth objective is to determine the effect of the independent variable on the dependent variable.

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- 2. The second objective is to determine the effect of the independent variable on the dependent variable.
- 3. The third objective is to determine the effect of the independent variable on the dependent variable.
- 4. The fourth objective is to determine the effect of the independent variable on the dependent variable.

In addition to the above stated system, at some later date the County may pursue two additional research projects to further broaden its understanding of the development process. These two projects, however, are not included in this RFP but are made reference to only for informational purposes to prospective consultants.

These projects are basically of a survey nature and include the following two items:

1. Analysis of Diversity: This will compare San Diego's economic base to that of other regions so as to alert the County to any unhealthy concentrations of employment and income in particular industries. It should also show any cyclical inclinations of various industries or other areas of general weakness in the regional economy which the County should be aware of.
2. Analysis of Migration: This will be a survey of recent arrivals to the area in order to find out why people move to San Diego. Unfortunately, the econometric model will be able to predict only the level of migration. This survey will examine the demographics and skills of new in-migrants. It will be conducted by surveying employees at new plants and new employees at existing plants.

As mentioned previously, a total of \$100,000 has been allocated for achievement of the above-stated objectives. Due to the broad staff, resource and experience requirements involved in a program of this nature, prospective consultants may desire to enter into a joint venture. It will be acceptable to the County if, in the interest of producing a better product, a consultant desires to enter a joint venture with the responsibility for the econometric and input-output models divided respectively between two or more parties.

It should be understood, however, that the County of San Diego will negotiate only with the primary consultant. The primary consultant must agree to accept responsibility for integration of work programs and schedules along with resolution of model discrepancies and/or any other related problems. Primary consultants should therefore be prepared to assign financial responsibility by component to the respective parties involved. Contract fulfillment of the consultant selected will require the simultaneous interface, integration and implementation of all system components, work programs and output of the complete economic impact analysis model/system.

WORK CRITERIA

In order to most efficiently and accurately address the above mentioned general and specific economic issues, the County has selected a system comprised of two primary modelling techniques to be constructed simultaneously and interface with each other on an operational basis. The two primary models/systems and their major components which will be integrated into a total economic impact model are the following:

1. Input-Output Model - This model should contain at a minimum:

A careful examination of possible sector breakdowns, taking into consideration the 1965 and 1968 input-output models developed for the San Diego economy by Dr. Tore Tjersland and the San Diego County Chamber of Commerce. Special emphasis should be placed on disaggregating each of the construction, durable manufacturing, and non-durable goods sectors.

No fewer production and final demand sectors than used in the Chamber of Commerce I-O model (i.e., fourteen and eighteen respectively).

A discussion of how the consumption and local government sectors are addressed.

Income, output and employment multipliers (coefficients).

Consistency checks on data used in the model.

A detailed plan for generation of new data; generating a local table from national co-efficients is unacceptable.

Plan for application, operation and annual updating of the model (User Guide).

2. Econometric Model - This model should contain at a minimum:

A simultaneous and dynamic system.

A disaggregated industrial sector (construction, manufacturing, trade, services, etc.).

An endogenous migration sector.

The ability to forecast local per capita income and unemployment.

An emphasis on changes in variables (i.e., flows) rather than levels (i.e., stocks).

Variables stated in real terms.

A simulation program to be run of OEM computer facilities.

Plans for application, operation and annual updating of the model (User Guide).

The ability to serve as a "driver" for the input-output model.

3. **Supplementary Econometric Analysis** - In addition to the disaggregated econometric model previously described, it will also be necessary to have a series of equations which relate the employment supply and demand of various industry sectors to important exogenous variables. For instance, employment in the durable manufacturing industry might be related to such variables as Gross National Product, local manufacturing wages, local utility rates, etc. Similar labor market analyses could be performed for other local industry sectors such as construction; finance, insurance and real estate; non-durable manufacturing; retail trade; services; transportation; government; higher education and research; and fisheries. The purpose of this analysis will be not only to provide greater disaggregation which must be obtained to derive the local unemployment forecasts desired but also to serve as a check against the disaggregated industry output of the input-output model. It will also add a dynamic dimension to the disaggregated data, thereby facilitating the ability to predict changes in this information over time. This analysis will improve not only the accuracy but also the validity of the output projections of both the major econometric and input-output models. This model should contain at a minimum:

A set of 15-to-20 not necessarily simultaneous equations to forecast employment changes in a similar number of industries.

Independent variables which include at least some of the output variables of the econometric model.

Enough independent variables to make projections meaningful.

4. **Approximation Techniques** - The final major component of the above system would be a substantial set of approximation techniques. Some of these techniques, for instance, would be obtained from building industry sources in order to help forecast employment demands during the construction phase of a project. Costs per square foot for commercial, industrial and residential buildings would be one type of useful information. They could be used to make total cost estimates when this information could not be obtained directly. Similarly, average man hours of various skills (electrical, plumbing, carpentry, etc.) on a per-1,000 square-foot basis could be used to estimate employment demands in the building trades. Obviously, these estimates could only be used when better information was unavailable.

Employment demand forecasts can be obtained from both the econometric and input-output models but these demands must be compared with the local labor supplies to determine the probable impact on local unemployment. Thus, considerable data must be obtained on local unemployed labor by skill classification and geographic location. Many of these data are available, and since breakdowns are also provided on a race and sex basis, it would be possible to make forecasts on minority employment impacts. The consultant in Phase II should collect these data, place them in a useful format for the County's development analysis, and establish procedures for the County staff to update the data on a quarterly basis. This entire procedure should be laid out formally in the user's manual. The precise techniques to be developed and employment data to be collected will depend on the specific model design. However, the consultant should specify the nature of the criteria upon which such approximation techniques will be based.

In addition to the four above major components of the economic impact analysis model/system are several other essential supplementary research projects that OEM will need to use with either or both of the major sub-models. These research efforts will provide either support or input material for the total model/system. Included in these projects are the following:

5. A Developer Questionnaire
6. Guidelines on the Need for Economic Analysis
7. Guidelines on Autonomous vs. Induced Impacts
8. Format for Systems Operation (User Guide)

Some of these projects are very narrow in scope and require only a minimal commitment of time and funds to develop. Others are more complex and involve more substantial cost. The following is a brief description:

5. The developer questionnaire will provide the specific data for input into the evaluation model/system. It should include questions on starting dates for construction phases, square footage of facilities, total construction costs, and use of local subcontractors. The operation phase of the questionnaire will have to be different for the various types of residential, commercial, and industrial developments. It should also be able to address both General Plans and Community Plans. Using industrial development as an example, the County will want to know such things as the starting date for operations, initial employment levels by skill types, the employee transfers and new hires by skill types, and the expected employee levels until full-scale operations are achieved. Additional questions would probably be developed after an in-depth analysis.

6. The guidelines on the need for economic analysis will provide the specific criteria for determining when to apply the economic evaluation model/system. These criteria can be stated in various forms depending on the type of development under examination. An industrial plant, for example, might be required to employ a minimum of 200 workers or have a payroll of at least \$2,000,000 before it is considered. Other types of criteria would be developed for residential and commercial projects. The scale factors would be chosen on the basis of the evaluation system's sensitivity and the total number of projects the County felt it could handle. There is no point in evaluating projects too small to be significant in terms of the model's error factors, nor qualifying so many projects that the County's staff cannot process them.
7. Another supplementary essential research project will be an explanation of how to evaluate autonomous versus induced impacts. This should be included in the user's manual. It is important to the total system for many reasons including the fact that commercial, industrial, and residential developments may have substantially different economic impacts in San Diego for the same level of total expenditure.

Income earned in an industrial plant may be entirely an autonomous increment to the San Diego economy, while income generated in the operation of a commercial office building, for instance, may be substantially an induced impact. One might characterize the issue as the difference between basic and non-basic industries. A highly simplified example illustrates this point. A new manufacturing plant (basic) can reasonably be expected to create new jobs in the local economy, but a new supermarket (non-basic) does not necessarily imply new net employment. To be sure, the new store would hire new clerks, a new manager, and various other workers. But unless the total retail shopping expenditure also increased by an amount equal to the new store's volume, the new store would simply be taking customers from other retail stores. Thus, the only significant changes that would take place in equilibrium would be the location of retail expenditure. Presumably, workers would lose jobs in competing stores as sales volume decreased. Certainly, some net impacts would exist as a result of any large-scale development. However, the ratio of net to gross employment impact for the economy as a whole will vary by project type.

Therefore, it will be necessary to differentiate between commercial, residential and industrial projects as well as Community and General Plans, explaining the use of the system in each instance. This project will probably comprise a major section of the user's manual which will support the total model/system.

8. The user's manual or format for systems operation will be one of the most important components of the total system. The user's manual will serve as an impact analysis handbook for OEM to follow in preparing an economic impact report for a major development project. Guidelines for analysis which should be developed and contained within the manual are not necessarily limited to, but include at a minimum, the following items:
 - a. Developer's questionnaire.
 - b. Guidelines on the need for economic analysis.
 - c. Guidelines on autonomous vs. induced impacts.
 - d. How to use all major components of the model.
 - e. Where to locate needed data.
 - f. Interpretation and use of model output.
 - g. When and how to use multipliers including the differentiation between induced versus autonomous effects.
 - h. The amount of error contained in model forecasts.
 - i. Location and analysis of data not produced directly by the model.
 - j. How to estimate impacts not generated by the model.
 - k. Pitfalls in analysis.
 - l. Discussion of major assumptions and what happens when they are not met.
 - m. Format design for presenting results of analysis.
 - n. Instructions on how to calibrate and/or update all components of the model/system.

PROPOSAL CRITERIA

The proposal shall contain the following information in the following sequence at a minimum.

1. The consultant's understanding of the economic issues to be addressed by the economic impact model/system.
2. The consultant's understanding of the methodologies which are to comprise the four (4) major components of the system including any special considerations regarding their implementation.
3. The consultant's understanding of the four (4) supplemental research projects and how they will be integrated with the major components of the system to form a total system.

Therefore, it is necessary to distinguish between the two types of information. The first type is the information that is used to make a decision. The second type is the information that is used to make a recommendation. The first type is the information that is used to make a decision. The second type is the information that is used to make a recommendation.

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PERSONAL DATA

The personal data shall contain the following information in the following sequence at a minimum:

1. The consultant's understanding of the economic system to be analyzed by the economic input model/system.
2. The consultant's understanding of the methodology used to analyze the data (a) and the components of the model (b) and any special considerations regarding their interpretation.
3. The consultant's understanding of the four (4) physical inputs, projects and how they will be integrated with the other components of the system to form a total system.

4. The consultant's understanding of how the input-output and econometric models will interface with each other and thereby integrate into a total system. Criteria for integration include the ability of sub-models to:
 - a. utilize a common data base.
 - b. arrive at consistent parameter estimates.
 - c. provide linkages between the sub-systems.
 - d. verify their accuracy by being subjected to testing based on historical data.
 - e. determine significance levels of both short run and long run predictions.
 - f. be programmed into a totally automated system.
 - g. facilitate periodic updating and/or recalibration.
 - h. be documented and utilized as operational tools on an ongoing basis by County staff.
5. An outline of the program to accomplish the work which should include, but not be necessarily limited to, the following:
 - a. A description of each task to be accomplished on an element-by-element basis.
 - b. An approximate schedule for completing the work on an element-by-element basis over a twelve-month period.
 - c. The estimated cost of the work outlined by each element involved.
 - d. A statement indicating the principle sources of information to be used during the course of contract work.
 - e. A statement indicating how the consultant will coordinate his efforts with those of other sub-contractors, if necessary.
 - f. A statement indicating how the consultant will maintain a strong liaison with appropriate County staff. The consultant, however, will not be able to utilize County staff except in a liaison capacity.
 - g. A schedule which includes four (4) quarterly progress reports and formal presentations of the same to, and as required by, appropriate County staff.
 - h. Provisions for a final formal presentation to the Board of Supervisors to include appropriate high-quality graphics and/or visual aids which thereafter become County property.
6. Provisions for programming, automation and documentation of the system and its components.
7. A brief description of the consultant's firm, including the location of principle offices, number of personnel, and other pertinent information.

The committee is authorized to use the information and data
which it receives for the purpose of determining the
effectiveness of the program.

1. To determine the effectiveness of the program in
achieving its objectives.
2. To determine the extent to which the program
has been implemented.
3. To determine the extent to which the program
has been accepted by the community.
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8. A brief description of similar or related projects successfully completed by the consultant's firm in the recent past, together with a list of approximately three client references for each such project. Additionally, samples of recent related projects should be submitted.
9. A brief statement relative to the consultant's background and experience in making presentations to elected and appointed officials and citizen groups and the availability of the consultant to make such presentations as part of the work contemplated by this RFP.
10. The names of all personnel who will be involved in the execution of the contract pursuant to this RFP, their qualifications and the specific work they are expected to perform. The contract awarded pursuant to this RFP will contain a "key personnel" provision. The County will require a binding agreement on these personnel commitments, and no changes will be allowed unless the County agrees in writing.
11. The name, title, address and telephone number of the individual(s) with authority to negotiate and contractually bind the consultant.

CONSULTANT SELECTION PROCEDURE

1. All proposals will be reviewed and rated by an evaluation board, comprised of County officials.
2. If it is deemed necessary, the top ranking candidates will be requested to appear for an interview before the evaluation board. It is expected that not more than three firms would be interviewed.
3. The board will select the consultant who it believes is best qualified to perform the work giving primary consideration to the technical competence and creative ability of the consultant as demonstrated in the proposal and during the interview process, if an interview is held. After determination by the board, it is expected a mutually-satisfactory contract will then be negotiated. If the consultant initially selected and County officials fail to reach an agreement, negotiations will be terminated and another firm will be invited to negotiate.
4. No contract shall be official until it is approved by the Board of Supervisors and Civil Service Commission.

GENERAL INFORMATION

1. A flashy or costly proposal format is not necessary and, in fact, is discouraged.

1. The purpose of this agreement is to provide for the orderly and efficient handling of all matters relating to the business of the company and to provide for the protection of the interests of the company and its shareholders.

2. The company shall be managed by the board of directors, who shall have the authority to make all decisions relating to the business of the company and to bind the company in all matters.

3. The company shall have the right to acquire, hold, and dispose of real and personal property, to incur debt, to make contracts, and to engage in any business that may be deemed to be in the best interests of the company.

4. The company shall have the right to make and alter its bylaws, and to amend or repeal any provision of its bylaws that may be deemed to be in the best interests of the company.

ARTICLE II - MEMBERSHIP

1. All persons who are admitted to membership in the company shall be entitled to the same rights and privileges as the other members of the company.

2. It is the policy of the company to admit to membership only those persons who are deemed to be in the best interests of the company and who are capable of contributing to the success of the company.

3. The board of directors shall have the authority to make and alter the rules and regulations governing the membership of the company, and to determine the qualifications for membership in the company.

4. No person shall be admitted to membership in the company unless he or she has been recommended by the board of directors and has been approved by the members of the company.

ARTICLE III - FINANCE

1. A share of the capital of the company shall be known as a share, and shall be entitled to the same rights and privileges as the other shares of the company.

2. Although no fixed date has been set for the completion of work under this RFP, it is expected that the job should be accomplished within one (1) year from the time a consultant(s) has been selected and a contract signed. The tentative time schedule related to this proposal is:

Deadling for filing proposals by	April 10, 1975	
Evaluation of proposals by	April 18, 1975	
Interviews on.	April 25, 1975	
Contract negotiations completed by	May 2, 1975	57
Contract approved by Board of Supervisors.	May 20, 1975	27
Contract begins.	June 2, 1975	
Work pursuant to contract.	June 2, 1975 to	
	June 2, 1976	
Final presentation and final printed report.	June 2, 1976	

3. The contract awarded pursuant to this RFP will contain a provision to provide for the withholding of ten (10) percent of the total amount of contract pending satisfactory completion of the work.
4. Payment for completion of project work will consist of five (5) progress payments including:
- a. Payment upon acceptance by County staff of each quarterly report documenting the consultant's progress toward total system development.
 - b. Payment upon acceptance by County staff of consultant's final report (150 copies) all required documentation, manuals, etc., and upon consultant's final presentation to the Board of Supervisors, if such presentation is considered appropriate by County staff.
5. All proposals must be based on a total of no more than \$100,000. Further, the consultant should recognize that subject to negotiation the County may require additional work items that were not specified in the consultant's proposals. These additional requirements will be included in the final contract.
6. The selection or non-selection of a firm to undertake the work contemplated by this RFP will not prejudice the ability of said firm to be considered for future work on related projects.
7. This RFP does not commit the County to award a contract or to pay any costs incurred in the preparation of a proposal pursuant to the RFP.

8. It will be acceptable if, in the interest of producing a better product, a consultant desires a joint venture with other firms or individuals to accomplish the work called for by this RFP.
9. The consultant selected pursuant to this RFP must meet the requirements of the County's Affirmative Action Program as set forth in Article IIIk of the County Administrative Code.

Information regarding the Affirmative Action Program is enclosed with this RFP. Additional information may be obtained from:

Office of Contract Compliance
County Operations Center, Building 11
5555 Overland Road
San Diego, California 92123
Telephone: (714) 565-5412

10. Eight (8) copies of the proposal shall be filed with Arnold Friedman at the address below not later than 5:00 p.m. on Thursday, April 10, 1975.
11. If there are any questions regarding this RFP or the work to be undertaken, please address inquiries to:

Arnold G. Friedman
Office of Environmental Management
1600 Pacific Highway, Room 252
San Diego, California 92101
Telephone: (714) 236-2011

In the event that Mr. Friedman is unavailable, inquiries may be directed to:

Michael K. Eckmann
Office of Environmental Management
1600 Pacific Highway, Room 252
San Diego, California 92101
Telephone: (714) 236-2011

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